

Project Scope and Customer Requirements Definition - PROC2010

Scope

This process defines how the Project Manager leads the PDT **in developing** project scope, expectations, and the decision-making process involved.

Policy

ER 5-1-11, U. S. Army Corps of Engineers Business Process

[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

Responsibility

The Project Manager (PM) is responsible for

- Serving as the **primary** project point of contact with the customer(s)
- Understanding who the customer is
- Leading the Project Delivery Team (PDT) in developing the **project** scope and a set of mutually acceptable project objectives that meets or exceeds the customers' expectations, while taking into account the needs, constraints, and expectations of other stakeholders
- Understanding that not all stakeholders may be known at the start of a project
- Understanding the customer/stakeholder needs and expectations and translating them into specific deliverables
- Leading PDT in determining how decisions will be made, **how** funding **will be** provided and **in developing the** acquisition strategy developed

The Customer is responsible for

- Providing all or some project funds and certain products and/or services on some projects
- **Sharing** decision-making authority.

The Stakeholder is responsible for providing **input** on project scope and schedule, **and** may or may not have decision-making authority or provide funds **and/or services**.

The Project Delivery Team (PDT) is responsible for **(check for agreement with proc2000)**

- Developing the **project** scope, while adhering to statutory, regulatory, and policy guidance
- Scoping, scheduling, and estimating their portions of the project **accurately**

- Discussing and **committing to** the quality and delivery expected for their respective products and services
- Discussing and **committing to** the key decision points included in the PMP
- Discussing and **committing to** a systematic approach to measure the progress, status, and quality of their respective products and services
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Distribution

Project Delivery Team (PDT)

Project Manager (PM)*

Ownership

The BP/P2 Configuration Manager is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

System References

Acronyms and Glossary- REF8000[REF8000]

Advanced Acquisition Strategy – PROC2060[PROC2060]

Change Management – PROC3010[PROC3010]

Change Management Plan – REF8009[REF8009]

Communications Plan – REF8006[REF8006]

Earned Value Management – REF8018[REF8018]

PMP/PgMP Approval – PROC2070[PROC2070]

PMP/PgMP Content – REF8005[REF8005]

PMP/PgMP Development- PROC2000[PROC2000]

Quality Management Plan – REF8008[REF8008]

Risk Management Plan – REF8007[REF8007]

Safety and Occupational Health Plan – REF8016[REF8016]

Activity Preface

This process is performed after a new project is identified, and may be performed **initially when the Project Delivery Team consists only of the Project Manager and the customer. In this case, a preliminary scope will be developed to determine PDT membership requirements.**

This process may also be conducted iteratively as a part of the PMP development and approval process. The charrette process is a proven method to effectively define customer criteria.

If the PDT is already established, the PM acts in conjunction with the rest of the PDT. If the PDT has not been established, this process may include coordination with subject matter experts as required.

After the **project** scope is defined, return to PMP/PgMP Development – PROC2000/PROC2000 .

Project Delivery Team (PDT)

1. Facilitate defining the customer's needs and expectations for the project.

Initial contact will include general discussions on scope, **customer requirements**, key deliverables, related goals, criteria, available resources, schedule requirements, quality expectations, risk analysis, preferred acquisition method (refer to Advanced Acquisition Strategy – PROC2060/PROC2060), procedures to change the project (refer to Change Management – PROC3010/PROC3010), and other customer conditions and preferences that may impact the way in which the project is executed.

Manage customer expectations by ensuring customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority.

2. Identify stakeholders and stakeholder issues.
3. Define how the customer and stakeholders will be involved throughout the project.
4. Work with the customer(s) to determine their role in the decision-making process and how funds **and/or services** will be provided.

Coordinate with RM PDT member on funds provisions.

5. Determine who will endorse/approve the Project Management Plan (PMP) for customer and approve changes to it.

Refer to PMP/PgMP Approval – PROC2070/PROC2070.

6. Facilitate development of customer's portion of communications plan.

Refer to Communications Plan – REF8006/REF8006.

7. Discuss potential risks with customer.

Refer to Risk Management Plan – REF8007[REF8007] and Safety and Occupational Health Plan – REF8016[REF8016].

8. **Determine if there is PDT consensus on project scope.**

If there is consensus, goto task #23. Otherwise, goto task #9.

9. **Provide project scope to Resource Providers**

Resource Providers

10. **Review project scope and recommend alternatives to PDT.**

Project Delivery Team (PDT)

11. **Evaluate alternatives and develop revised project scope.**

12. **Determine if there is PDT consensus on project scope.**

If there is consensus, goto task #23. Otherwise, goto task #13.

13. **Provide project scope to Middle Management Team.**

Middle Management Team

14. **Review project scope and recommend alternatives to PDT.**

Project Delivery Team (PDT)

15. **Evaluate alternatives and develop revised project scope.**

16. **Determine if there is PDT consensus on project scope.**

If there is consensus, goto task #23. Otherwise, goto task #17.

17. **Provide project scope to PRB.**

Project Review Board (PRB)

18. **Review project scope and recommend alternatives to PDT.**

Project Delivery Team (PDT)

19. **Evaluate alternatives and develop revised project scope.**

20. **Determine if there is PDT consensus on project scope.**

If there is consensus, goto task #23. Otherwise, goto task #21.

21. **Provide project scope and alternatives to Commander.**

Commander

22. **Review project scope and alternatives and provide solution to PDT.**

Project Delivery Team (PDT)

23. Finalize draft **project** scope.

Include consideration of the customers' needs and expectations, cost and schedule requirements, quality objectives, special technical requirements and unique criteria, and the decision making/change approval process for the project. Work closely with other members of the PDT (if established) to ensure all necessary items are addressed and issues resolved.

Ensure customer understanding of essential professional standards, laws and codes in the project, as well as project-specific guidance or requirements from higher authority.

24. Enter synopsis of customer scope in P3e.

If detailed scope is different than the synopsis, goto task #25. Otherwise, end of activity.

25. Attach detailed scope as a reference document in P3e.

End of activity.





